digitalarena
I.T. CONSULTANCY AND SOFTWARE SOLUTIONS

Spark Site Administrator

User Manual – Version 5.8

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Site Administrator Overview

Site Administrator overview

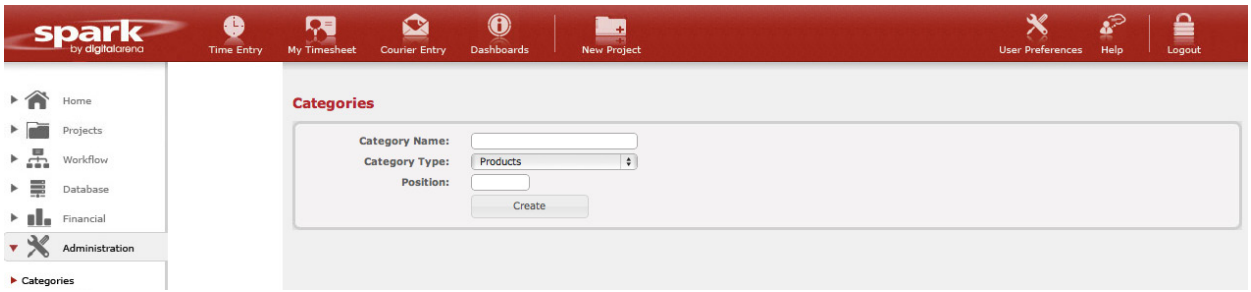
As a Site Administrator of Spark, you have access to the Administration menu giving you features such as creating new staff members, moving time and materials from one job to another, setting up dashboards, bulk closing of projects to name a few. It is important to understand these features fully before undertaking any changes.

TIP: Your Digital Arena Spark contact is available to assist and answer any questions you may have. Please contact the main office on +64 9 477 0396 or email spark@digitalarena.co.nz.

Understanding the Administration menu

Categories	Allows you to create categories for products and projects
Close Projects	Performs a search of projects fitting a set criteria and allows multiple projects to be closed at the same time
Dashboards	Allows the set up of a dashboard email Financial Summary => margins and predicted monthly result figures (daily email) Production Summary => current work in progress (WIP) and deadlines (daily email) Timesheets Summary => previous week's hours by staff member and client (weekly email)
Delete	Where you can delete projects, proposals, jobs, purchase orders and invoices
GL Codes	Where you can create general ledger (GL) codes **Note:** The GL codes MUST match your financial system exactly
Job Locations	Where you can create job locations i.e the potential location for where a job could be at any given time
Preferences	General preferences set up for Spark for example, what calculations are based on, defaults, what accounting application to use for transfers etc
Proposal Presets	Where you can assign a proposal to be used as a template for new proposals
Proposal Time Names	Where you create a set of labour products that will appear in the Time tab of a proposal
Purchase Order Move	Where you can move a purchase order from one job to another
Purchase Order Presets	Where you can default copy into the description field of a purchase order by selecting a purchase order type
Reopen	Where you can reopen projects, proposals, jobs, purchase orders and invoices
Staff	Where you can set up new users, change user permissions and add user signatures
Time/Materials Move	Where you can move time and/or materials from one open job to another
Transactions Log	A basic transaction log showing actions that users performed i.e opening a job, closing a proposal, deleting an invoice, changing a general preference etc

How do I create a new category?

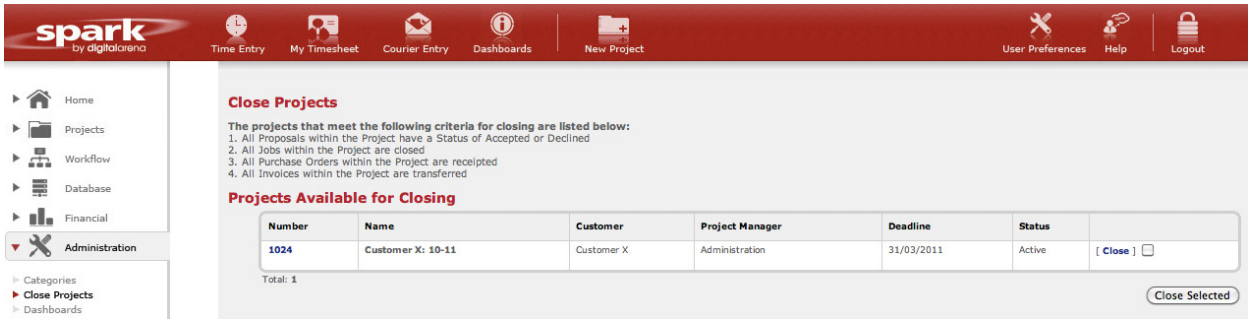


To create a new category:

1. Go to ***Administration -> Categories***
2. Click the action button ***New Category*** and complete the following:
   a. ***Category Name*** (enter a descriptive title for the category for example Creative, Art Materials, Couriers etc)
   b. ***Category Type*** (select the appropriate type from the drop down list)
      Products => will be used for products in the product database (default)
      Project => will be used for projects
   c. ***Position*** (enter the position number that you want to assign to the category)
      Note: This is for product categories only. The position determines the order of the categories on the proposal and invoice PDFs when Detailed is set to *No*.
3. When complete, click ***Create***

Note: The *Actual vs Invoice* report under the Financial -> Reports menu reports by product category. For this report to work correctly you must set up product categories and assign each product in your product database to a category.

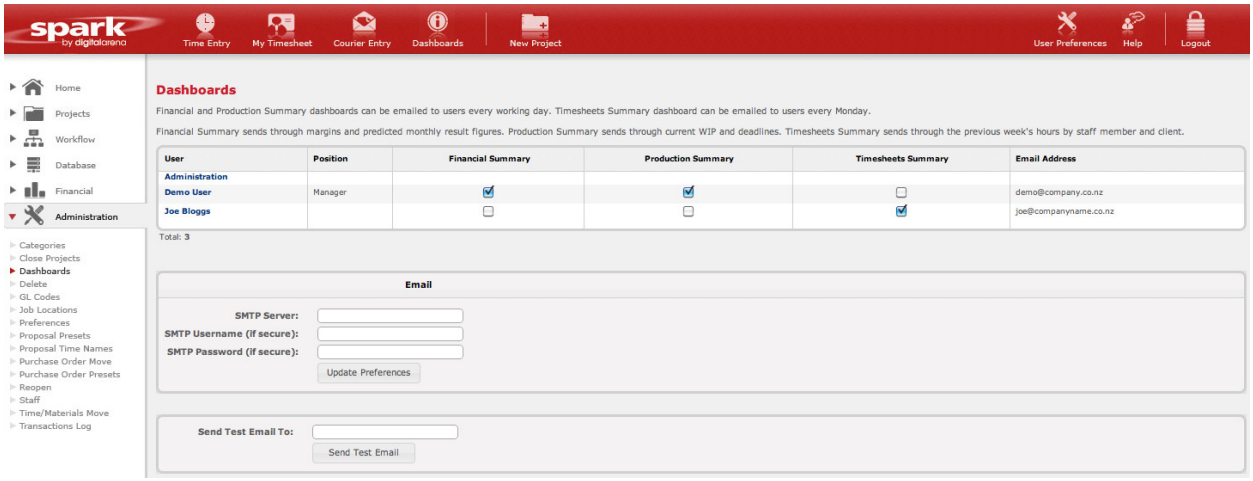
How do I bulk close projects?



To bulk close projects that meet a certain criteria:

1. Go to ***Administration -> Close Projects*** – a search will run for all projects meeting the following criteria:
   Proposals => all proposals within the project have a status of *Accepted* or *Declined*
   Jobs => all jobs within the project are *Closed*
   Purchases => all purchase orders within the project are *Receipted*
   Invoices => all invoices within the project are *Transferred*
2. Tick each project you wish to close
3. Click ***Close Selected***

How do I set up dashboards?

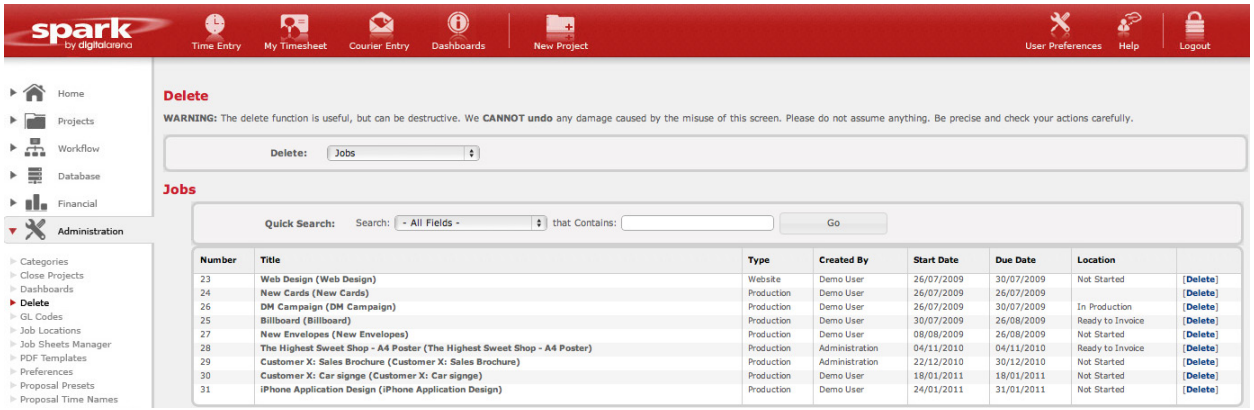


To set up dashboards:

1. Go to ***Administration -> Dashboards*** – a list of *Active* users will be shown and tick boxes will display if an email address exists in the user profile
   - If an email address is not present, click on the user name – this will take you to the user profile where a valid email address can be entered in the ***Email*** field. Click ***Update*** to save your changes.
2. Enter your email address in ***Send Test Email To*** and click ***Send Test Email***
   - If no summary emails are received, please contact your Digital Arena Spark contact as additional set up maybe required

Tick each summary you wish to turn on for a user:
Financial Summary => margins and predicted monthly result figures (the summary will be emailed daily on weekdays)
Production Summary => current work in progress (WIP) and deadlines (the summary will be emailed daily on weekdays)
Timesheet Summary => previous week's hours by staff member and client (the summary will be emailed weekly on a Monday)

How do I delete a project/proposal/job/purchase/invoice?

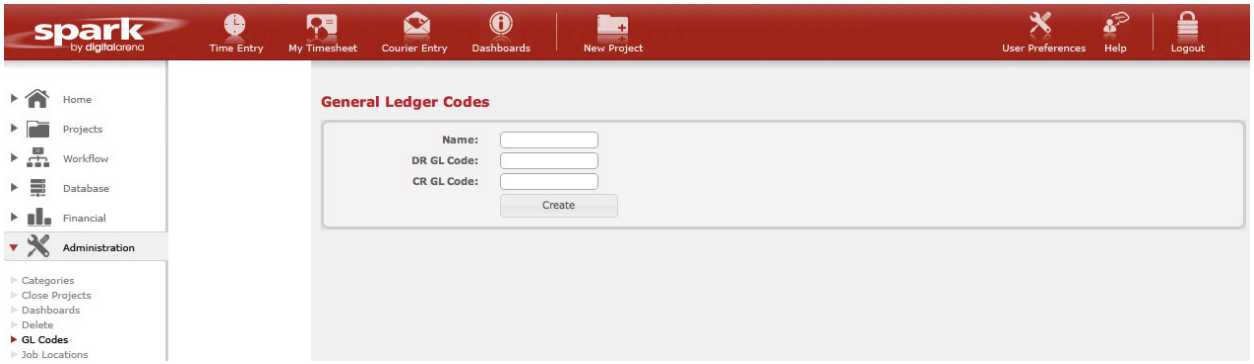

spark by digitalarena
Time Entry
My Timesheet
Courier Entry
Dashboards
New Project
User Preferences
Help
Logout
Home
Projects
Workflow
Database
Financial
Administration
Categories
Close Projects
Dashboards
Delete
GL Codes
Job Locations
Job Sheets Manager
PDF Templates
Preferences
Proposal Presets
Proposal Time Names
Delete
WARNING: The delete function is useful, but can be destructive. We CANNOT undo any damage caused by the misuse of this screen. Please do not assume anything. Be precise and check your actions carefully.
Delete: Jobs
Jobs
Quick Search: Search: - All Fields - that Contains: Go
Number Title Type Created By Start Date Due Date Location
23 Web Design (Web Design) Website Demo User 26/07/2009 30/07/2009 Not Started [Delete]
24 New Cards (New Cards) Production Demo User 26/07/2009 26/07/2009 [Delete]
26 DM Campaign (DM Campaign) Production Demo User 26/07/2009 30/07/2009 In Production [Delete]
25 Billboard (Billboard) Production Demo User 30/07/2009 26/08/2009 Ready to Invoice [Delete]
27 New Envelopes (New Envelopes) Production Demo User 08/08/2009 26/08/2009 Not Started [Delete]
28 The Highest Sweet Shop - A4 Poster (The Highest Sweet Shop - A4 Poster) Production Administration 04/11/2010 04/11/2010 Ready to Invoice [Delete]
29 Customer X: Sales Brochure (Customer X: Sales Brochure) Production Administration 22/12/2010 30/12/2010 Not Started [Delete]
30 Customer X: Car signge (Customer X: Car signge) Production Demo User 18/01/2011 18/01/2011 Not Started [Delete]
31 iPhone Application Design (iPhone Application Design) Production Demo User 24/01/2011 31/01/2011 Not Started [Delete]

To delete an entity from Spark:

1. Go to ***Administration -> Delete***
2. Select the entity you want to delete from the ***Delete*** drop down list i.e project, proposal, job, purchase or invoice
3. Use the ***Quick Search*** to find the entity you want to delete and click ***Go***
4. Click ***Delete***
5. A warning pop up window will display – click ***OK*** to delete the entity

IMPORTANT:
The delete action can not be undone. Please check the entity carefully before deleting it. It is not recommended to delete invoices or purchases after they have been transferred to the financial system as this may cause inaccuracies.

How do I create general ledger (GL) codes?

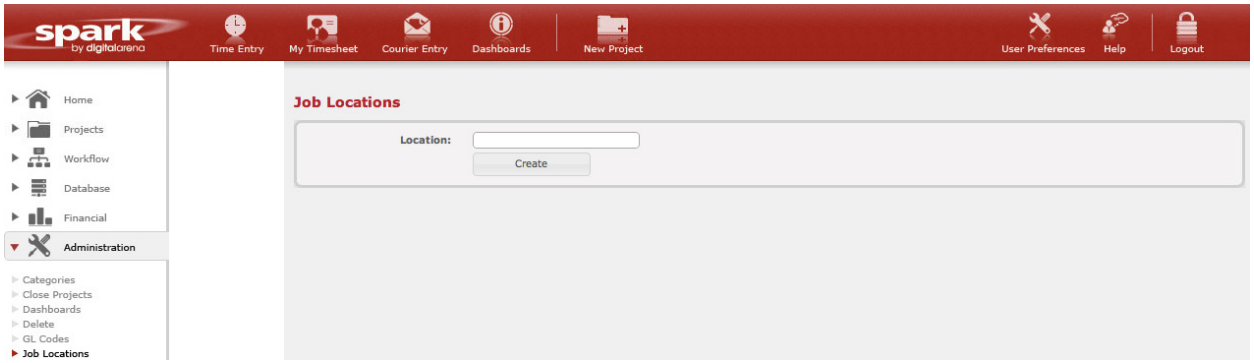


To create a new GL code:

1. Go to ***Administration -> GL Codes***
2. Click ***Create New GL Code***
3. Enter a ***Name***, ***DR GL Code*** (debtor) and ***CR GL Code***
    - DR and CR GL codes MUST match your financial system exactly
    - It is OK to enter *n/a* for a DR/CR code if it will be never used – for example you might sell (DR Code = 123) the product administration but you never buy (CR code = n/a) administration
4. Click ***Create***

IMPORTANT:
After adding GL codes you must go to Database -> Products and check each product in your products database is assigned to the correct GL code.

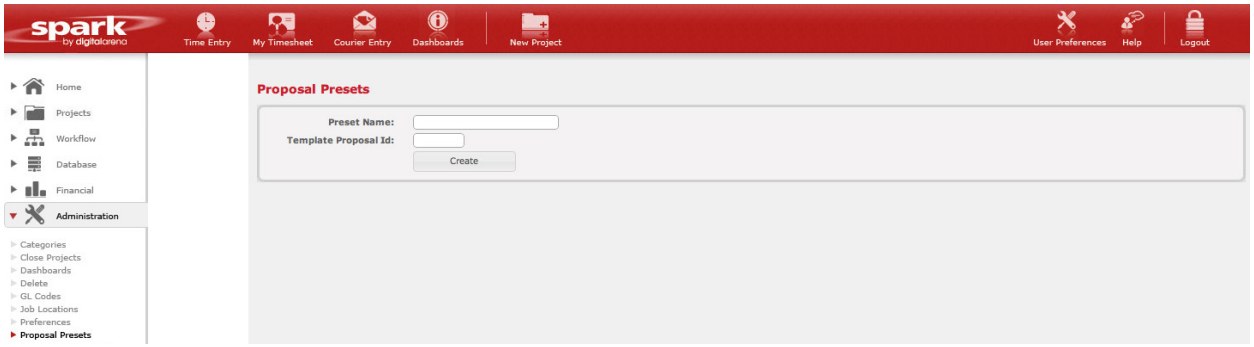
How do I create job locations?



To create a new job location:

1. Go to ***Administration -> Job Locations***
2. Click ***Create New Job Location***
3. Enter a ***Location*** – for example With Client, In production, Ready to Invoice
    - The job's location can be changed in the following areas of Spark: Job detail tab, Time Entry window, Workflow - Work in Progress and Workflow -> WIP Overview
4. Click ***Create***

How do I create a proposal template?



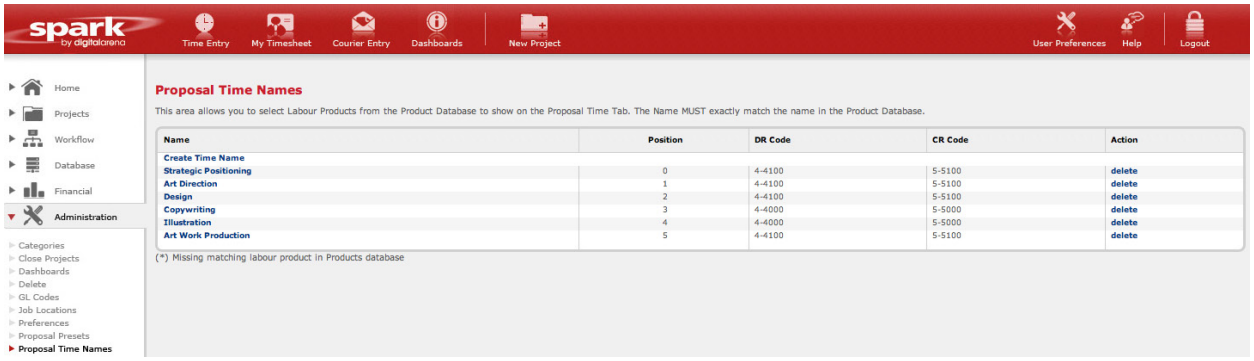
When creating a new proposal, you can copy an existing proposal (by referencing a proposal id) or use a proposal template.

TIP: To set up proposal templates, create a new project called *Proposal Templates*. Then create proposals in this project that you want to use as templates i.e your ideal website design proposal, your ideal business cards proposal etc. All your proposals used as templates will be located in one project for ease.

To create a proposal preset:

1. Go to ***Administration -> Proposal Presets***
2. Click ***Create New Proposal Preset***
3. Enter a ***Preset Name*** – for example Website Design Template, Business Cards Template
4. Enter the ***Template Proposal Id***
5. Click ***Create***

How do I create a proposal time name?



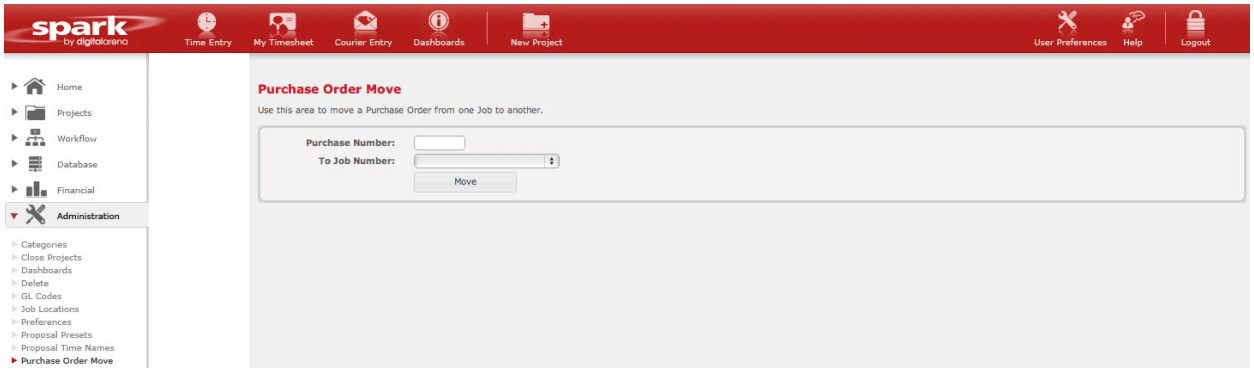
IMPORTANT:
All proposal time names MUST have a matching labour product in the products database. If there is no match, a * will be displayed next to the time name. The GL codes MUST also match the labour product.

To create a new proposal time name:

1. Go to ***Administration -> Proposal Time Names***
2. Click ***Create Time Name***
3. Enter a ***Name*** – this must match a labour product in your products database
4. Enter a ***Position*** – this determines the order of the time names in the Time tab of a proposal and invoice
5. Select the correct ***DR Code*** and ***CR Code*** from the drop down fields
6. Click ***Update***

Note: This will affect new proposals and invoices created from this point onwards.

How do I move a purchase order from one job to another?

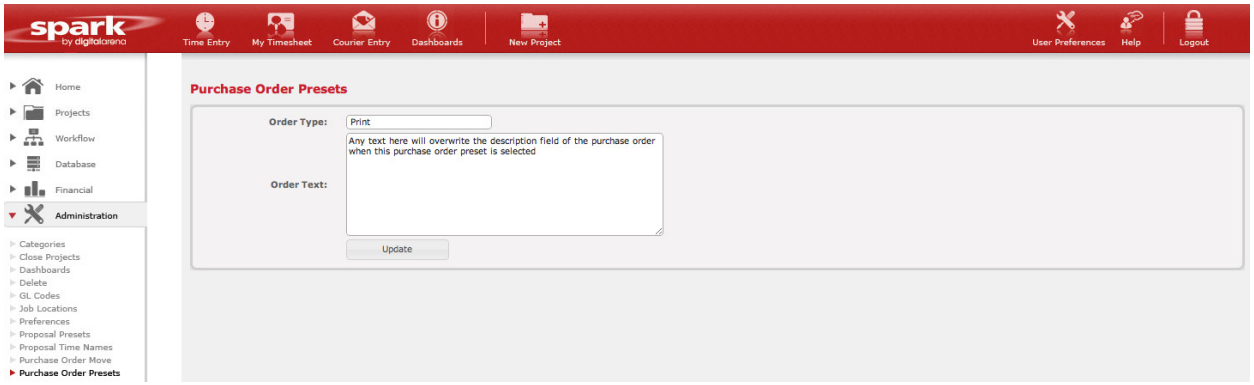


To move a purchase order:

1. Go to ***Administration -> Purchase Order Move***
2. Enter the ***Purchase Number***
3. Select a job to move the purchase order to from ***To Job Number***
4. Click ***Move***

Note: You can only move a purchase order to an *Open* job.

How do I create a purchase order preset?

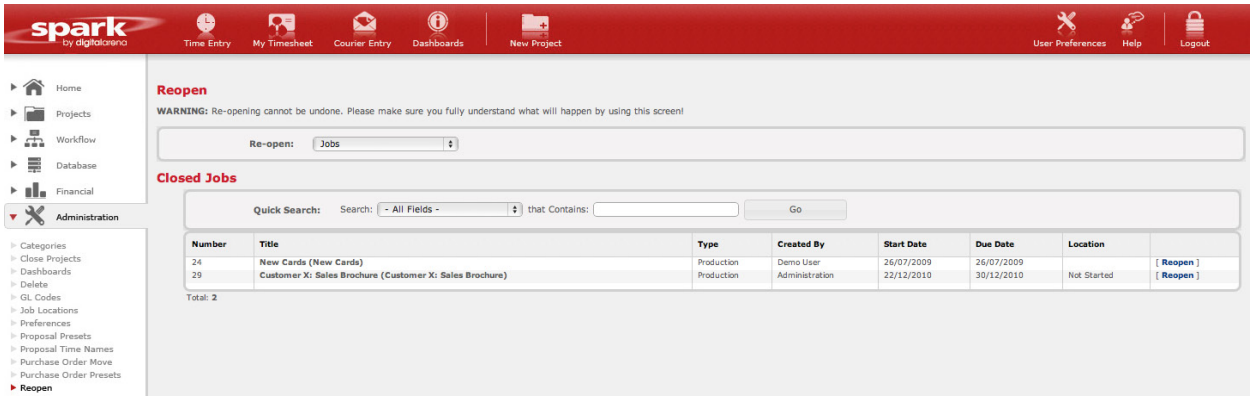


A purchase order preset is used to default copy into the purchase order description field when the preset (purchase order type) is selected.

To create a purchase order preset:

1. Go to ***Administration -> Purchase Order Presets***
2. Enter the ***Order Type*** – for example, Print, Media, Photography
3. Enter the default text in ***Order Text***
4. Click ***Create***

How do I reopen a project/proposal/job/purchase/invoice?

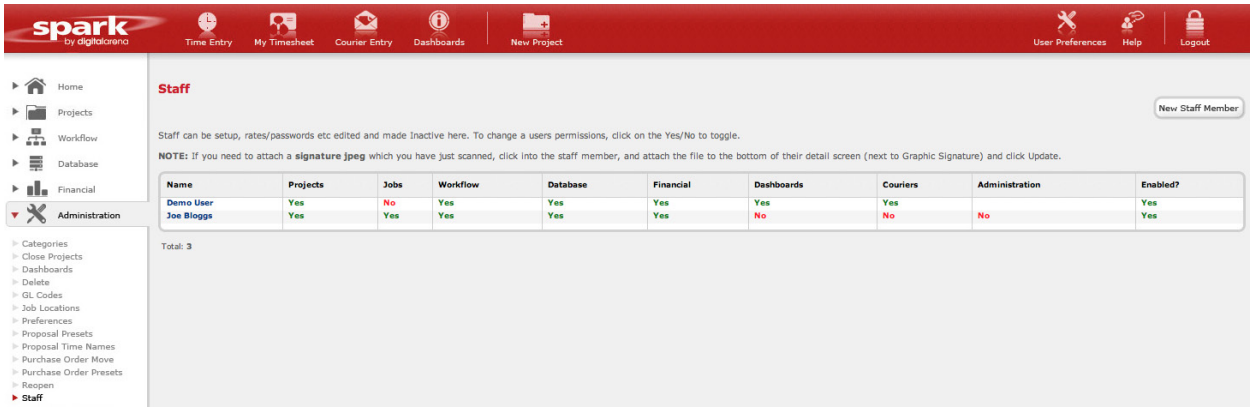


To reopen an entity from Spark:

1. Go to ***Administration -> Reopen***
2. Select the entity you want to reopen from the ***Re-open*** drop down list i.e project, proposal, job, purchase or invoice
3. Use the ***Quick Search*** to find the entity you want to delete and click ***Go***
4. Click ***Reopen***

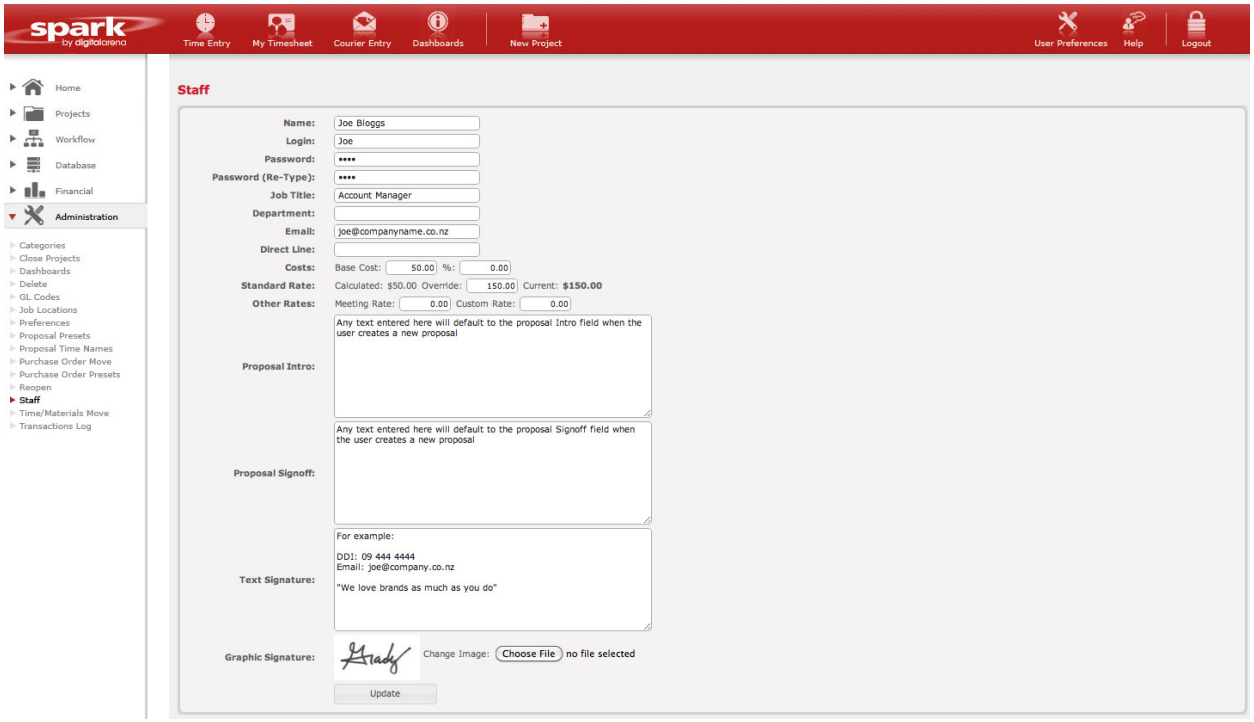
IMPORTANT:
The reopen action can not be undone. Please check the entity carefully before reopening it. It is not recommended to reopen invoices or purchases after they have been transferred to the financial system as this may cause inaccuracies.

How do I create a new user?



To create a new user:

1. Go to ***Administration -> Staff***
2. Click ***New Staff Member***



3. Complete the staff member profile:

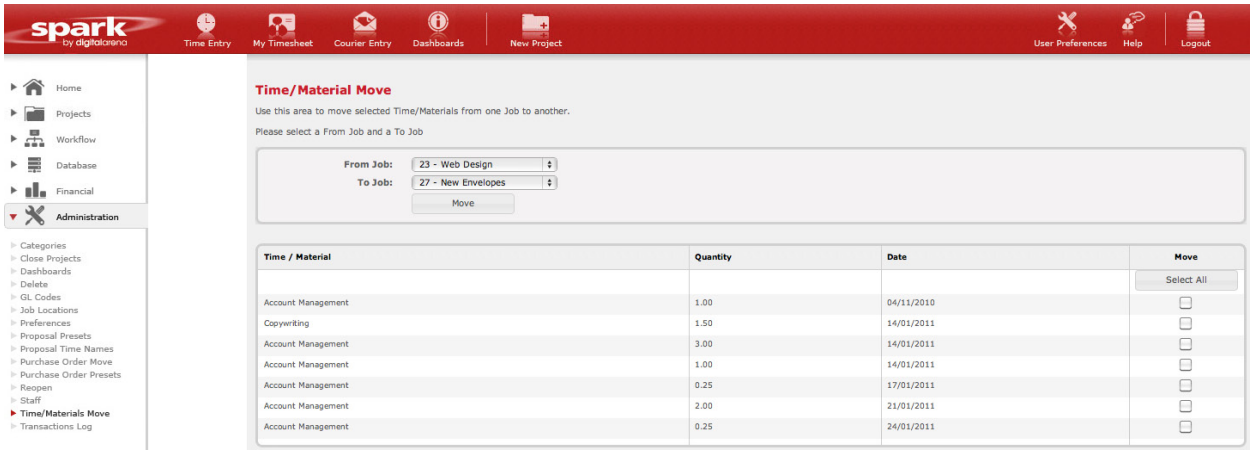
Name	=> Full name of the staff member i.e Joe Bloggs
Login	=> Login name, typically the first name unless there are more than one staff members with the same name i.e Joe
Password	=> A unique password of 4 or more characters
Job Title	=> Job title of the staff member i.e Designer
Department	=> To search tasks by department under Workflow -> Tasks, this field must be completed
Email	=> Email address used for daily dashboard emails
Direct Line	=> DDI phone number
Costs	=> The hourly cost of the staff member (only complete this field if your calculations preference under Administration -> Preferences is set to *Staff*, *Product/Staff/Product* or *Product/Staff/Staff*). The *Base Cost* and/or % will complete the *Calculated* field.
Standard	=> The standard hourly rate of the staff member. If the *Calculated* standard rate is not correct, use the *Override* field.
Other Rates	=> Enter a *Meeting Rate* and *Custom Rate* if alternative hourly rates are required for the staff member. (only complete this field if your calculations preference under Administration -> Preferences is set to *Staff* or *Product/Staff/Staff*)
Proposal Intro	=> Enter default text for the proposal *Intro* field used for new proposals
Proposal Signoff	=> Enter default text for the proposal *Signoff* field used for new proposals

Text Signature => The text signature will display on pdfs below the staff member's name
Graphic Signature => Click ***Choose File*** and navigate to a jpeg of the staff member's signature and click ***Choose*** to upload the file to the profile

4. Click ***Create***

IMPORTANT:
Set the user permissions by clicking the *Yes/No* under each appropriate heading. If a user no longer requires access to Spark, click *Yes* under *Enabled* (this will change to a *No*).

How do move time and/or materials from one job to another?

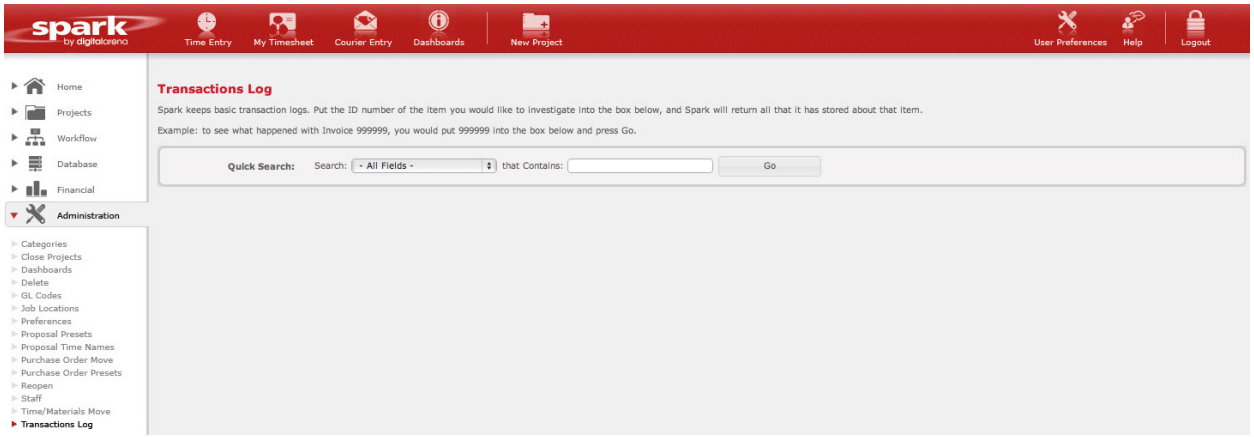


To move time and/or materials:

1. Go to ***Administration -> Time/Materials Move***
2. Select a job in the ***From Job*** drop down list – a list of time and materials available to move will display
3. Select a job in the ***To Job*** drop down list
4. Tick the time/materials you want to move or click ***Select All***
5. Click ***Move***

Note: You can only move time and/or materials from *Open* jobs to *Open* jobs. Only those time and/or materials that are not marked as billed on an invoice will be displayed.

How do I view transactions made by users?



To view basic transaction logs:

1. Go to ***Administration -> Transactions Log***
2. Use the ***Quick Search*** to find the action/entity id you want to investigate and click ***Go***

How do I view the general preferences set up?

To view general preferences:

1. Go to ***Administration -> Preferences***
2. Click ***Update Preferences*** to save any changes

IMPORTANT:
Before making any changes to preferences, please contact your Digital Arena Spark contact to talk through the effects and to clarify functionality.